

***David Might Need A Bigger Stone This Time:
The Power of the Incumbency Advantage Within the Media***

An Honors Thesis (HONR 499)

by

Cameron DeBlasio

Thesis Advisor

Dr. Chad Kinsella

**Ball State University
Muncie, Indiana**

April 2020

Expected Date of Graduation

May 2020

Abstract

Within the world of politics, there may be nothing more significant than the incumbency advantage. Whenever a sitting politician decides to run for reelection, they normally have substantial advantages over anyone who attempts to run against them either in the primary or in the general election. Political parties rally around incumbents, and this support often comes by way of monetary contributions which are critical to any success in the political arena. One of the ways these funds are used is through advertising. Media outlets, be it newspapers, television outlets, or radio stations, provide this important avenue of outreach to candidates for a substantial price, and the candidates with the most money available to purchase this advertising often have the most success in elections. Not only is the advertising sold by media companies critical, but media coverage in general also plays a vital role in elections. Although the general consensus is that incumbents often have an advantage within the media, the question is whether challengers are afforded any kind of assistance, albeit minimal, in these situations. Through the creation of academic podcasts, and based on the feedback from those who listened to the podcasts, it is clear that the general public believes challengers face an uphill battle when attempting to overcome the incumbency advantage within the media, regardless of party affiliation.

Acknowledgments

I would like to thank my advisor, Dr. Chad Kinsella, for his assistance throughout the duration of this project. His expertise in political campaigns helped shape this project into the academic study it is today.

I would like to thank my guest analysts, Dr. Brandon Waite and Dominic Bordenaro, for being willing to join me on my podcasts. This project would not have been the same without their thoughtful insight and political acumen. I would also like to thank all of the people who listened to the podcasts and provided critical feedback which served as the backbone of this research.

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Process Analysis Statement

When first determining how to conduct this research, it was important for me to be able to combine elements of both of my majors, journalism and political science. While my academic path has essentially been split between two years of journalism to start my time in college and two years of political science courses to complete it, I still wanted to incorporate aspects of both areas of my studies. News and political science are often seen as two starkly different but closely intertwined subject matters. At all levels of government, the news industry serves as a watchdog by holding both elected officials and the bureaucracy accountable. Often referred to as “The Fourth Estate,” media members are tasked with a significant responsibility to keep the general public informed about what the government is doing and why it is doing it. This thesis highlights not only the interaction between these two fields but also how each field can, at times, influence and affect the other.

The biggest decision regarding this thesis was determining the format to use in order to connect journalism and political science. It was clear from early in the process that the subject matter of the thesis would pertain to political science and the method of dissemination would connect to my journalistic background. Journalism provides a wide array of options for distributing information. Whether it be via a written medium, a broadcast medium, or a combination of the two, it was clear that I was going to use my journalistic background in storytelling to both present information and serve as the platform for my experimental component. The only question was determining how this would be done. In an effort to create a product that was both more modern and easier to distribute than a standard newspaper or a television broadcast, I elected to choose

podcasts as the method of dissemination. Once this became clear, I then had to determine what the content of those podcasts would be.

I knew the academic information presented within the podcasts would be based on the research I would do pertaining to my topic, but the question was what that topic would be. As someone with an interest in both political campaigns and the election process, I believed this would be a sound place to start. As I began researching possible research areas, I realized I wanted journalism to not only play a role in the way I presented my research but also be connected to the research itself. This led me to research the concept of the incumbency advantage not in general but specifically in regard to how this advantage plays out in the media. The idea of the media providing an advantage to incumbents in elections is a not novel one, so I knew this could not be the way I approached the research. The media, although its job is to remain objective, does play a role in the reelection rate of incumbents. These politicians are the ones already in office, so the media naturally covers them during this time and provides the public with a way to regularly see and hear from them. When a challenger enters a race, whether it be in a primary or a general election, they are already at a disadvantage within the media because they have not been in the political spotlight as consistently as their opponent. This is conventional wisdom within both of these fields, and the goal of my research was not to support conventional wisdom.

Knowing this, I chose to take my research in a different direction. Instead of seeing if the research would confirm what was already clear, I wanted to see if the opposite could be true. I tasked myself with determining whether there are any kinds of advantages that the media provides to challengers when they are running against

incumbents. This is rarely discussed, if ever at all, as being the reality within the media when there is a challenger attempting to unseat a sitting politician. That is exactly what made research topic intriguing, and as daunting as it sounded, this was the direction I chose to go. After conducting some initial research on the topic and consulting with my advisor, I then began to explore what would be the best way to use my dissemination method, the podcasts, to present my findings in a clear and concise manner. While I initially thought I would use the podcasts to simply relay the information I had gathered through my research, I later determined that the research itself would only be one part of the podcasts' overall purpose. One of the best ways to maximize the effectiveness of podcasts if you are the host is to invite guests to come on the podcast and share their thoughts about whatever you may be discussing. Because I wanted to ensure that these podcasts would be as authentic as possible, finding these guests became my next task.

Before I began the process of determining who these guests would be, it started to become clear that these podcasts were going to serve a different purpose than I had originally intended. As I was conducting my research about the incumbency advantage within the media, I found quickly that there was not a lot of information pertaining to the idea of advantages given to challengers within the media. This was not completely unexpected, but it did require me to think outside of the box in order to find a way to determine if members of the general public believe the media does in fact provide any kinds of advantages to challengers in elections with incumbents. Due to this lack of academic research, my advisor and I determined it may be best to use the podcasts as a means to conduct research of my own on the topic. Instead of simply using the podcasts as a way to relay the information I found in my research, I was now going to

use them as part of an experiment to attempt to prove that, despite a lack of academic research and concrete evidence, some people do believe that the media provides challengers with some forms of advantages in elections.

The plan was to make this a fairly straightforward experiment. I would create the podcasts consisting of one guest analyst each, find a group of people to listen to them, and then have each listener complete a survey based on the information they received from each podcast. Now that this plan was in place, I refocused my attention on determining who the guest analysts would be. One of the first people who came to mind was one of the professors from the political science department, Dr. Brandon Waite. I knew he had an extensive background dealing with the relationship between politics and the media, so this felt like a logical choice. As I thought about other options, I wanted to make sure I had a guest who could not be easily identified as an expert in the field of political science. Even so, I did want to ensure this was still a person who had a good amount of both knowledge of and experience in the field. This led me to contacting my second guest analyst, Dominic Bordenaro. I knew Dominic had a wide range of real-world experience with politics. Although he was a student, I still believed he could provide thoughtful insight about the discussion I was planning to have on the podcast. I also thought it could be useful to have a guest analyst who was not a licensed expert because I wanted to see how this differentiation would impact people's views about the validity of what was discussed in the podcast. After contacting both of these people and recording the podcasts, I then turned my attention to finding a pool of willing subjects to listen to the podcasts and complete the subsequent surveys for each of them.

This was, to be honest, one of the most challenging elements of this project. Had I known sooner how different the world would be by the middle of March due to the COVID-19 pandemic, I would have begun reaching out to people as soon as we returned from winter break, if not sooner. Because I had not finished recording both of my podcasts, however, I did not start communicating with people until the end of March. This made it very difficult to get people to commit to partake in this experiment because I could not discuss the parameters of it with them face to face. My goal was to use only Ball State students for this study because I wanted to have the same general demographic represented across the board. Looking back now, I realize that it may have been useful both for the representativeness of the study and for the sake of completing the project to expand my pool to include non-Ball State students of varying age ranges. Once I received enough feedback to constitute what I believed to be a legitimate study, I then began analyzing and interpreting the results.

I have several takeaways from this project pertaining to both how I conducted it and what I learned from it. When I initially began brainstorming ideas for what I would do, I had no idea how well I would be able to incorporate elements from both of my majors. I decided midway through my sophomore year that I no longer wanted to be a journalist as I originally thought. At the time, I believed this was the end of putting my journalistic skills to use. As I became more engrossed in my political science major, I quickly realized how valuable my journalism background was and would continue to be. This research project emphasized its value even further. Being able to communicate effectively and write clearly and concisely are important tools for any field of study and any line of work. Whether it was knowing how to conduct an interview as I did for both of

my podcasts or understanding how to differentiate between credible and noncredible sources while conducting research, I saw firsthand how important these journalistic skills will always be in my life. As I am now about to begin a three-year journey as a law school student, I realize now just how much the skills I have gained both as a writer through journalism and as a researcher in political science will continue to be useful along the way.

In addition to what I learned about myself, I also learned a lot about the power of the incumbency advantage. Our democracy is predicated on the fact that American citizens have the right to choose their leaders. Being able to vote in free elections is one of the most important components of our country's history. Based on the results of the experiment I conducted, it is interesting to see just how many people may believe their choices are made for them before they even head to the polling stations. Incumbents are always at a significant advantage in elections for many reasons. To see how much of an impact the media actually has on people's views of elections is very enlightening nonetheless. Since Americans are predisposed to so much information in the media about incumbents during their time in office leading up to a reelection bid, one could start to wonder whether challengers ever have a legitimate shot of unseating them. I argue that this significant hill to climb is not due to constituents being unwilling to vote incumbents out of office but rather can be attributed to constituents being told by the media how much of an insurmountable deficit challengers often face when taking on incumbents. The results of my study, albeit small in sample size, do appear to align with many of the assertions about the incumbency advantage. This study shows the importance of the media providing challengers with as level of a playing field as

possible. It almost certainly cannot be done while an incumbent is in office, but once an election cycle begins, coverage must be as equal and as objective as possible in order to not sway voters before they make a decision about each candidate. Informing voters is important for journalists to do, but influencing them is a different and unethical choice to make. As I previously said, politics and the media are always going to be closely connected. It is up to journalists to decide how much influence they are comfortable having over people's decisions about who their elected officials should be.

Data Analysis and Results

The initial research for this study was used as the basis for the information discussed within the academic podcasts. The first academic study of note pertains to a 1987 article from the journal, *Legislative Studies Quarterly*. The article is titled, "Mass Media in Congressional Elections." Authors Edie N. Goldenberg and Michael W. Traugott make several assertions about the media's role in congressional elections both with and without incumbents. For the purposes of this study, only the information pertaining to congressional elections with incumbents is analyzed. One of the biggest reasons incumbents are continuing to have increased success with reelection campaigns is a greater understanding of how to use the media to their advantage. "Increasingly attentive to their dealings with the press, incumbents direct steady streams of information back to their constituencies, maintaining visibility and the perception that they are actively working on behalf of those who elected them" (p. 334). This then leads to a stronger recognition rate among voters when incumbents are preparing for reelection campaigns. It is more difficult for challengers to have this same level of recognition when running against incumbents because they have not been in the high-profile position that allows incumbents to garner strong media attention.

While the study makes this general claim about congressional elections, it does acknowledge a difference between the success rate of challengers in races for the United States Senate versus challengers for seats in the House of Representatives. The main point of contrast here deals with the difference in frequency of these elections. Because House seats are elected every two years, they receive substantially less media attention than Senate races which are only held once every six years. For House

seats, this means challengers face considerable difficulties trying to make a name for themselves because journalists do not give as much attention to these far more frequent elections. For Senate challengers, this demonstrates a key reason why they tend to have a far higher success rate when it comes to unseating incumbents. “Greater news attention overall, more effort to provide balanced coverage of both candidates, and the more skillful and aggressive use of paid media by challengers contribute to more competitive campaigns” (p. 336). These three components are key to understanding why challengers in Senate elections have a much higher success rate against incumbents than challengers in House elections do.

The second article referenced in the podcasts is a 1994 article from the journal, *Political Research Quarterly*. The article is titled, “Comparing Gubernatorial and Senatorial Elections.” The main assertion from this article centers on the previously discussed advantages for challengers in senatorial elections and compares it to the even higher rates of success for challengers in gubernatorial elections. Its most significant piece of data is that “from 1980 to 1992 only 11 percent of lowest profile challengers running against Senate incumbents were successful, while 24 percent of such challengers in gubernatorial contests won” (p. 718). The authors say one of the biggest contributions to this 13 percent difference is the heightened level of media attention on the chief executives of each state compared to their Senate counterparts. In the table labeled Figure 1 in this study, the number of news stories about governors was substantially higher than the number of stories about each state’s two senators combined (p. 709). The point here is that a higher level of news coverage leads the public to have a stronger opinion about incumbent governors and makes people more

willing to vote them out of office. If people are more familiar with what governors are doing, then they are more likely to form an opinion about them, be it positive or negative. Unless senators are running against a high-profile challenger, the public is less likely to have formed an opinion about them and often chooses to reelect them.

The third and final article discussed in the podcasts is from a 2003 edition of the journal, *State Politics and Policy Quarterly*. The article is titled, "Not All Money Is Equal: The Differential Effects of Spending by Incumbents and Challengers in Gubernatorial Primaries." This study analyzes the importance of advertising, one of the media world's most significant roles during campaigns. It provides candidates with a way to purchase media exposure of which they control the narrative. The study, although focusing on a very specific type of election, suggests challengers in these situations can benefit substantially from an increase in name recognition and the opportunity to publicly explain their stances on specific issues. Author Kedron Bardwell acknowledges that although these challengers may see significant gains from buying a large amount of advertising, "it is a rare gubernatorial primary where the challenger is close enough to the incumbent and raises enough money for this effect to make a difference in the outcome of the election" (p. 303). This was seen on a micro level during the 2020 Democratic primary season when the former mayor of New York City, Michael Bloomberg, spent hundreds of millions of dollars in an attempt to become the party's nominee. While he quickly catapulted to near the top of the list of candidates, it was ultimately not enough to overtake either of the two men who were widely publicized in the media as the frontrunners from the beginning, Joe Biden and Bernie Sanders.

The purpose of this study was to determine whether a person's opinion about the incumbency advantage within the media could be influenced by either the information presented in the podcasts or the credibility of the people speaking in the podcasts. In preparation for conducting this study, it was important to identify the makeup of both the focus group and the guest analysts for each podcast. Each of the five participants are current Ball State University students. They were each asked to identify their party affiliation with the options of Strong Democrat, Lean Democrat, Independent, Lean Republican, Strong Republican. Based on the responses, one participant is Strong Democrat, two participants are Lean Democrat, and two participants are Lean Republican. No participants are Independent or Strong Republican. This variety is critical to conducting as representative of a study as possible.

The guest analyst on the first podcast was Dr. Brandon Waite. He is currently an associate professor of political science at Ball State. Dr. Waite has been at the university since 2008 and specializes in connections between politics and the media. This guest was intended to appear as a qualified expert to the participants, but his political affiliation was not made known in the podcast. The guest analyst on the second podcast was Dominic Bordenaro. Dominic is a current Ball State student. He has served as the president of the Ball State Democrats, the vice president of College Democrats of Indiana, and the deputy campaign manager for former Muncie, Indiana mayoral candidate Terry Whitt Bailey. This guest was not intended to appear as an expert but rather as an experienced activist with ties to the Democratic Party. The ultimate goal was to see if having two guests with varying backgrounds would impact how the participants viewed their credibility. Each participant was asked to rate each analyst's

credibility with the options of Excellent, Good, Average, Poor, and Awful. Based on the responses to the podcast with Dr. Waite, four participants rated him as Excellent, and one participant rated him as Good. For the podcast with Dominic, one participant rated him as Excellent, one participant rated him as Good, and three participants rated him as Average. This matches the assumption that the expertise of Dr. Waite would make him appear more credible than Dominic.

Another question about the information presented in the podcasts related to the level of quality of the academic sources referenced. Each of the three aforementioned sources was referenced in both of the podcasts, and the participants were asked to rate the overall quality of them as Excellent, Good, Average, Poor, or Awful. Based on the survey results, four participants rated them as Good, and one participant rated them as Average. This suggests the information presented based on these sources could have had an influence over the participants' opinions about the general topic. The participants were also asked how much these podcasts changed their opinion about the incumbency advantage. They were given the options of A lot, Somewhat, or Not at all. Based on the results of the survey, three participants responded Somewhat, and two participants responded Not at all. This shows that these podcasts, regardless of how good their quality was or how reputable the guest analysts were, did have an impact on three people's opinions about a critical concept in understanding elections. Another important question dealt with how much effect the participants believed the media has on the incumbency advantage. The respondents were given the options of Significant impact, Slight impact, or No impact at all. Based on the survey results, all five participants responded with Significant impact. This shows that the public, regardless of party

affiliation, overwhelmingly believes that the media plays an important role in the incumbency advantage.

In total, there were 12 questions on the survey, and each participant took the survey twice to reflect their opinions about each separate podcast. The eighth question asked respondents how confident they are in a challenger's ability to defeat an incumbent in a gubernatorial election in Indiana. This is directly connected to the statistic that 24 percent of incumbent governors lost to challengers in reelection bids between 1980 and 1992. The participants were given the options of Very confident, Somewhat confident, or Not confident at all. Based on the survey results, one participant said Very confident, three participants said Somewhat confident, and one participant said Not confident at all. The participant who responded with Very confident identified as Lean Republican. The three participants who responded with Somewhat confident identified as Strong Democrat, Lean Democrat, and Lean Republican, respectively. The participant who responded with Not confident at all identified with Lean Democrat. This shows that no Democrats were fully confident in a challenger's ability to win, and no Republicans were fully unconfident in a challenger's ability to win. Given that Indiana has been consistently a red state for nearly four decades, it is understandable for many Democrats to be convinced that their candidates have a tall task when attempting to defeat an opponent while Republicans may believe there is a more level playing field for both parties.

While this research does not suggest that the media provides substantial advantages to challengers against incumbents, it does highlight certain situations where challengers have better chances than others. Gubernatorial races tend to be more

contested than House or Senate races, and the survey results from the panel suggest that people believe this is the case. Spending money on advertising, a critical tool afforded to political candidates by the media, does allow challengers who can afford to pay for substantial advertising to increase their name recognition and make their political views known to potential voters. Even so, the bottom line is that this does not make up for what is often an incredible amount of money being spent by incumbents or the significant amount of time an incumbent spends in the news throughout their previous term in office. Although there was no doubt already, it is clear that the media plays a major role in shaping the outcome of elections whether it intends to do so or not.

There are many ways to further this research beyond what is presented in these podcasts and through this experiment. The final topic discussed in the podcasts is the rise of social media in modern society. While each guest analyst gave his opinion about the impact this has on elections, it would be beneficial to conduct a qualitative study much like this one to determine how important this tool is for both challengers and incumbents. Was social media partially responsible for Democratic Congresswoman Alexandria Ocasio-Cortez defeating ten-term incumbent Congressman Joe Crowley in the 2018 primary election for New York's 14th Congressional District? Will the presence of social media make this a more common occurrence in the future? These are questions that further research about this topic should answer to better understand the full context and capacity of the incumbency advantage within all forms of media.

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Appendix One — General Podcast Topics/Questions

1. The idea of the incumbency advantage is not new. There are many ways in which sitting politicians have a leg up on anyone who attempts to unseat them in elections, whether it be the primary or the general. What is far less commonly discussed, however, is whether the media may actually provide challengers with some advantages of their own during elections. Do you buy this idea, or is there not enough evidence to back it up?
2. A 1987 article from the journal *Legislative Studies Quarterly* titled “Mass Media in Congressional Elections” makes the assertion that the incumbency advantage in the media is more prevalent in House races than in Senate races. This was over 30 years ago, so do you believe this claim still holds true today?
3. The last question highlighted the potential differences between the two chambers of Congress when it comes to the incumbency advantage. Now let’s talk about two positions which are elected by the same populations of people – senators versus governors. A 1994 article from the journal *Political Research Quarterly* titled “Comparing Gubernatorial and Senatorial Elections” says this – “From 1980 to 1992, only 11 percent of lowest profile challengers running against Senate incumbents were successful, while 24 percent of such challengers in gubernatorial contests won.” They attribute this to the higher levels of media coverage on governors as opposed to senators, thus allowing people to form stronger opinions about them and be willing to vote them out of office because they are more informed about the job they are doing. Does this still feel like a fair assessment today?
4. Now let’s discuss one of the media’s biggest impacts on election cycles – selling advertising opportunities to candidates. We’re seeing it even now with someone like Mike Bloomberg, who is spending hundreds of millions of dollars on campaign ads and, at last check, is now polling in third place nationally in the Democratic primary after only being in this race for two and a half months. A

2003 article from the journal *State Politics and Policy Quarterly* titled “Not All Money Is Equal: The Differential Effect of Spending by Incumbents and Challengers in Gubernatorial Primaries” found that campaign spending for challengers in these situations can help tremendously when they are trying to bolster name recognition and discuss their positions on different issues. Do you feel like this is actually the case, and do you believe this is the case in other types of elections as well?

5. A lot of the information we’ve discussed is fairly dated, with the most recent of the three articles referenced being published nearly 20 years ago. As our society has shifted to be very focused on social media, do you feel like there are ways in which challengers have advantages in that realm as well? One instance which comes to mind is Alexandria Ocasio-Cortez’s massive upset over 20-year incumbent Congressman Joe Crowley in 2018. She built a massive following through social media and rode the support all the way to Capitol Hill. Do you think this kind of social media exposure leading to incumbent losses could become commonplace in the future?

Appendix Two — Survey Questions

1. After listening to this podcast, how would you rate its overall quality?
 - a. Excellent
 - b. Good
 - c. Average
 - d. Poor
 - e. Awful
2. How would you rate the credibility of the host?
 - a. Excellent
 - b. Good
 - c. Average
 - d. Poor
 - e. Awful
3. How would you rate the credibility of the guest expert?
 - a. Excellent
 - b. Good
 - c. Average
 - d. Poor
 - e. Awful
4. How would you rate the credibility of the outside sources referenced in the podcast?
 - a. Excellent
 - b. Good
 - c. Average
 - d. Poor
 - e. Awful
5. How much did this podcast change your opinion about the incumbency advantage in the media?
 - a. A lot
 - b. Somewhat
 - c. Not at all
6. How much did this podcast change your opinion about the need for term limits in Congress?
 - a. A lot
 - b. Somewhat
 - c. Not at all

7. How much of an impact does the media have on the incumbency advantage?
 - a. Significant impact
 - b. Slight impact
 - c. No impact at all
8. How confident are you about a challenger's ability to defeat an incumbent in a gubernatorial race in Indiana?
 - a. Very confident
 - b. Somewhat confident
 - c. Not confident at all
9. How confident are you about a challenger's ability to defeat an incumbent in a United States senatorial race in Indiana?
 - a. Very confident
 - b. Somewhat confident
 - c. Not confident at all
10. How confident are you about a challenger's ability to defeat an incumbent in a race for the United States House of Representatives in Indiana?
 - a. Very confident
 - b. Somewhat confident
 - c. Not confident at all
11. How confident are you about a challenger's ability to win the state of Indiana against an incumbent in a presidential election?
 - a. Very confident
 - b. Somewhat confident
 - c. Not confident at all
12. Please identify your political affiliation.
 - a. Strong Democrat
 - b. Lean Democrat
 - c. Independent
 - d. Lean Republican
 - e. Strong Republican

Digital Supplements

Link to Podcast with Dr. Brandon Waite:

<https://www.youtube.com/watch?v=HjDbYHINwPw&t=41s>

Link to Podcast with Dominic Bordenaro:

https://www.youtube.com/watch?v=Ek-Khe_dTcc&t=147s